



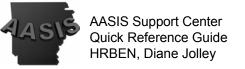
# AASIS Support Center Quick Reference Guide containing

Quick Reference Cards (QRC)

for

### **HRBEN**

Benefits Administration Version 4.2





#### **Version Control Sheet**

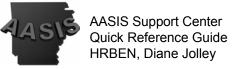
Course: HRBEN- QRG Guide

Courseware Items: Quick Reference Cards

**Change Summary** 

Changes made to this document are summarized in the following table

DATE	CHANGE	CHANGE REASON FOR CHANGE	
4/3/01	QRC's developed and published		
07/17/02	Updated to Version 2.0	No changes to QRC's. Added to V2 Core Curriculum Only.	All in V2 Core
08/27/02	Updated to Version 3.0 - Combined QRC #1—5 in one Guide	Combined QRC's 1-5 in one Guide	All
9/25/02	HRBN0001 Not applicable for adding dependent with no change in deduction, updated to version 3.1	Simplify process	8
9/25/02	Vendor will provide effective date of approved coverage, updated to version 3.1	Expanded possible scenarios	10
01/23/03	Courseware updated to V4.0	vare updated to V4.0 Basic change in all courseware docur	
3/10/03	QRG Guide updated on pages Q 11 and Q 12.	Updates in Courseware	Pages 11/12





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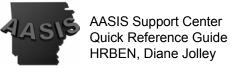
Course: HRBEN- QRG Guide

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**Change Summary** 

Changes made to this document are summarized in the following table

DATE	CHANGE REASON FOR CHANGE		Changed Pgs
04/01/03	Change in task from Change Miscellaneous Benefit Plans – Post Tax to Cancel Post-tax Benefit Plans	Miscellaneous Benefit Plans by EBD  – Post Tax to Cancel Post-tax	
04/01/03	Effective date for cancellation of Post-tax Benefit Plan	Change in policy by EBD	12
04/01/03	Change in process from Change in Optional Life Amount to Cancel Post-tax Optional Life Amount	Change in policy by EBD	17
04/01/03	Change in process from Change in Dependent Life Amount to Cancel Post-tax Dependent Life Amount	Change in policy by EBD	17
04/01/03	Change in process from Change Post-Tax Benefit Plan to Cancel Post-Tax Benefit Plan	Change in policy by EBD	17
04/01/03	Deleted process Enroll in Post-Tax Benefit Plan (Misc. Benefit Change)	Change in policy by EBD	17
04/01/03	Pages re-numbered	Additional page needed	3-20





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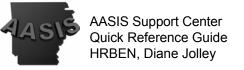
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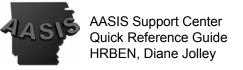
DATE	CHANGE	REASON FOR CHANGE	Changed Pgs
10/09/03	Change in procedure for enrolling employee in the Basic Employee Life plan	Change in procedure	6,9 & 13
10/09/03	Changed note to reflect effective date must be within current fiscal year.	Change in procedure by OPM/State Payroll	17





# QUICK REFERENCE CARD INDEX

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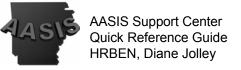




### QRC 1 - Benefits Administration Transactions

(Pg 1 of 3)

TASK	MENU PATH	TRANSACTION CODE
Create Benefit Enrollment - Rehire	Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30)	PA30
Create A Dependent Record	Human Resources > Personnel Management > Administration > HR Master Data > Maintain	PA30
Create New Hire Benefit Enrollment - Employee Elections and Basic Employee Life  Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) and Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001)		PA30/HRBEN0001
Create New Hire Benefit Enrollment - Automatic Plans	Human Resources > Personnel Management > Benefits > Enrollment	HRBEN0001
Add Additional Child to Benefit Plan	Human Resources > Personnel Management > Administration > HR Master Data > Maintain	PA30
Correct Employee Benefit Enrollment Elections	Human Resources > Personnel Management > Benefits > Enrollment	HRBEN0001
Create Benefit Enrollment - HIPAA Special Enrollment Special Enrollment  Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) and Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001)		PA30/HRBEN0001
Display Employee Benefit Data	Human Resources > Personnel Management > Administration > HR Master Data > Display	PA20
Stop Participation for One of Several Children  Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001) and Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30)		HRBEN0001 / PA30

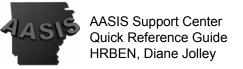




### QRC 1 – Benefits Administration Transactions

(Pg 2 of 3)

TASK	MENU PATH	TRANSACTION CODE
Generate Changes in Benefits Elections Report	Human Resources > Personnel Management > Benefits > Info System > Reports > Participation > Changes in benefits Elections	HRBEN0077
Changes in Eligibility Report	Human Resources > Personnel Management > Benefits > Info System > Reports > Participation > Eligible Employees	HRBEN0079
Eligible Employee Report	Human Resources > Personnel Management > Benefits > Info System > Reports > Participation > Eligible Employees	HRBEN0071
Health Plan Costs Report	Human Resources > Personnel Management > Benefits > Info System > Reports > Costs and contributions > Health plan costs	HRBEN0073
Record Evidence of Insurability	Human Resources > Personnel Management > Benefits > Insurability (HRBEN0004) and Human Resources > Personnel Management > HR Master Data > Maintain (PA30)	HRBEN0004/PA30
Participation Report	Human Resources > Personnel Management > Benefits > Info System > Reports> Participation	HRBEN0072
Display Overview of Benefit Plan Data	Human Resources > Personnel Management > Benefits > Overview	HRBEN0006
Run Headcount Changes Report	Human Resources > Personnel Management > Administration > Info System > Reports > Employee > Organizational Entity > Headcount Changes	S_L9B_07000180
Time Evaluation Message Display Report	Human Resources > Time Management > Administration > Time Evaluation > Time Evaluation Messages	S_PH9_46000588

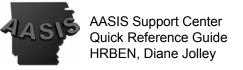




### QRC 1 - Benefits Administration Transactions

(Pg 3 of 3)

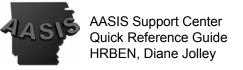
TASK	MENU PATH	TRANSACTION CODE
Monitor Eligibility	Human Resources > Personnel Management > Benefits > Eligibility	HRBEN0003
Print Confirmation Form	Human Resources > Personnel Management > Benefits > Forms > Confirmation	HRBEN0015
Change Employee Optional Life Benefits	Human Resources > Personnel Management > Administration > Benefits > Enrollment	HRBEN0001
Enroll Benefit Plan During Open Enrollment	Human Resources > Personnel Management > Administration > HR Master Data > Maintain (PA30) and Human Resources > Personnel Management > Benefits > Enrollment (HRBEN0001)	PA30/HRBEN0001
Stop Participation for One of Several Children	Human Resource > Personnel Management > Benefits > Enrollment (HRBEN0001) and Human Resources > Personnel Management > HR Master > Maintain (PA30)	HRBEN0001/PA30
Employee Voluntary Increase of Optional Life Coverage Exceeding \$40,000	Human Resources > Personnel Management > Administration > HR Master Data > Maintain	PA30
Terminate Benefit Coverage	Human Resources > Personnel Management > Benefits > Termination	HRBEN0014
Insurance Plan Costs Report	Human Resources > Personnel Management > Benefits > Info System > Reports> Costs and contributions > Insurance plan costs	HRBEN0074
Perform Benefits DROP	Human Resources > Personnel Management > Benefits > Termination	HRBEN0014





# QRC 2 – Benefits Administration Maintain Employee Benefits Data (Page 1 of 2)

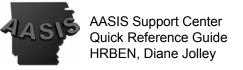
TASK	MENU PATH	TRANSACTION CODE	
Create New Hire Benefit Enrollment - Automatic (Savings) Plans	Human Resources > Personnel Management > Benefits > Enrollment	HRBEN0001	
Create New Hire Benefit Enrollment - Employee Elections and Basic Employee Life Plan	t Human Resources > Personnel Management > Administration > HR Master Data > Maintain (add dependents and provide benefits medical information such as PCP.		
	Human Resources > Personnel Management > Benefits > Enrollment Enroll employee and dependent(s) if applicable in requested state sponsored plans and in the Basic Employee Life plan.	HRBEN0001	
Record Evidence of Insurability	Human Resources > Personnel Management > Benefits > Insurability	HRBEN0004	
	Human Resources > Personnel Management > Administration > HR Master Data > Maintain (Change the 'From' date for the optional insurance plan located in infotype 0168 Insurance Plans to the beginning date of the pay period in which the approved coverage should be deducted. Also, change the 'Participation' date to the effective date of coverage supplied by the Insurance provider).	PA30	
Correct Employee Benefits Enrollment Elections	Human Resources > Personnel Management > Benefits > Enrollment	HRBEN0001	
Display Employee Benefit Data	Human Resources > Personnel Management > Administration > HR Master Data > Display and select the appropriate tab and infotype	PA20	
Create Dependent Record	·		





# QRC 2 – Benefits Administration Maintain Employee Benefits Data (Page 2 of 2)

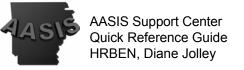
Task	Menu Path	Transaction Code
Create Benefit Enrollment – HIPAA Special Enrollment	Human Resources > Personnel Management > Administration > HR Master Data > Maintain (add dependents and provide benefits medical information such as PCP. Create Adjustment Reason. Once Adjustment Reason is created AASIS will ask you if you want to go to enrollment now. Click yes. If you click no then use the menu path below to access enrollment later.)	PA30
	Human Resources > Personnel Management > Benefits > Enrollment Enroll employee and dependent(s) if applicable in requested state sponsored plans.	HRBEN0001
Cancel Post-Tax Benefit Plans	Human Resources > Personnel Management > Administration > HR Master Data > Maintain (add dependents and provide benefits medical information such as PCP. Create Adjustment Reason. Once Adjustment Reason is created AASIS will ask you if you want to go to enrollment now. Click yes. If you click no, then use the menu path below to access enrollment later.)	PA30
	Human Resources > Personnel Management > Benefits > Enrollment Enroll/Change employee and dependent(s) if applicable in requested state sponsored plans.	HRBEN0001
Print Confirmation Form	Human Resources > Personnel Management > Benefits > Forms > Confirmation	HRBEN0015
Terminate Benefits Coverage	Human Resources > Personnel Management > Benefits > Termination	HRBEN0014





# QRC 3 – Benefits Administration Infotypes (Page 1 of 2)

Infotype	Number	Description
General Benefits Information	0171	This infotype stores the employee's Benefit area as well as their 1 <sup>st</sup> and 2 <sup>nd</sup> programming group. This information defaults in from the Organizational Assignment infotype (0001) and determines the benefits for which an employee is eligible.
Adjustment Reason	0378	This infotype processes an employee's benefits adjustments. A benefit adjustment is the reason why an employee must make changes to his or her benefit elections. An adjustment reason must be recorded prior to making a change in an employee's benefits. Examples include New Hire, Family Status Change, and so on.
Family/Related Persons	0021	This infotype stores the data of an employee's family members, other related persons, as well as emergency contact information. During Benefits enrollment, all eligible dependents in this infotype are displayed and can be attached to applicable plans.
Benefits Medical Information	0376	This infotype stores an employee's and their dependent's primary care physician information as well as smoker designation.
Health Plans	0167	This infotype contains the employee's benefit plan, calculation dates, options, dependent coverage, covered dependents, and cost information.
Insurance Plans	0168	This Infotype contains the general plan data, calculation dates, options selected, benefits/ salary insurance coverage amounts, eligibility information, proof of insurability requirements, and cost information.
Flexible Spending Accounts	0170	This infotype contains the calculation date and annual contribution amount for Medical and Dependent Care Spending Accounts, as well as, the minimum and maximum employee contribution guidelines.
Savings Plans	0169	This infotype contains the calculation date and employee and employer contribution amount/ percentage for these plans.



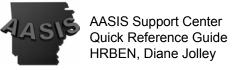


# QRC 3 – Benefits Administration Infotypes (Page 2 of 2)

Infotype	Number	Description
Organizational Assignment	0001	This infotype contains detailed information about an employee's position in the organization, including the position number, personnel area, personnel subarea, business area, payroll area, employee group and employee subgroup.
Actions	0000	This infotype contains a history of all of the personnel actions that have been performed for the employee. This infotype contains the employee's Hire Date.
Additional Personal Data	0077	This infotype can be used to track an employee's ethnic origin, military status, veteran status, and any disability.
Personal Data	0002	This infotype enables you to update an employee's marital status prior to creating/ updating a spouse's Family/ Related Person (dependent) record.
Addresses	0006	This infotype enables you to record an employee's home, work, and emergency addresses.
Date Specifications	0041	This infotype enables you to keep track of the employee's original hire date, latest hire date, career service date, vesting date, and other important dates.
Basic Pay	0008	This infotype enables you to view an employee's annual salary.

#### **Adjustment Reason Subtypes**

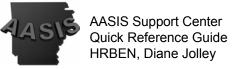
- •Family Status Change
- •HIPAA
- •New Hire Enrollment
- •Transfer (Rtr. Plans)
- •Transfer (All Plans)
- •Return from LWOP
- Misc Benefits Changes
- Promotion/ Demotion
- •Rehire





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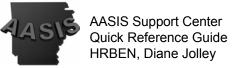
Enrollment or Benefits Change Transaction:	PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable	PA30- Maintain Master Data Adjustment Reason (0378)	HRBEN0001- Enrollment	HRBEN0014- Benefits Termination
New Hire (Automatic Plans)	Hire Date	Hire Date	Hire Date	Not applicable
New Hire Enrollment (Employee Elections and Basic Employee Life)	Hire Date	Not applicable	Date of application	Not applicable
Family Status Changes	HANDLED BY EBD			
Change in Savings Plan Contributions (Anytime changes)	Not applicable	Not applicable	Effective date is the beginning of the pay period in which the change should be made active	Not applicable
Change in Miscellaneous Benefit Plan (Post-tax)	Not applicable	Date of Change in Coverage	Date of Change in Coverage	Last day of the month following the cancellation date
Adding dependent with no change in deduction (adding newborn to existing children coverage)	Actual birth date or adoption date	Not applicable	Not applicable	Not applicable





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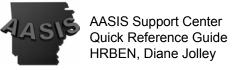
Enrollment or Benefits Change Transaction:	PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable	PA30-Maintain Master Data Adjustment Reason (0378)	HRBEN0001- Enrollment	HRBEN0014- Benefits Termination
Stop Participation for One of Several Children	Effective date is the 1st of the month after the dependent looses eligibility.	Not applicable	Effective date is the 1st of the month after the dependent loses eligibility.	Not applicable
HIPAA Change	Event Date	Effective Date of Coverage will be the 1st day of the month following the application date and must be within 30 days of the HIPPA event.	Effective Date of Coverage will be the 1st day of the month following the application date and must be within 30 days of the HIPPA event.	Not applicable
Open Enrollment	Date of application within Open Enrollment period	Not applicable for open enrollment	Date of application, within Open Enrollment period	Not applicable





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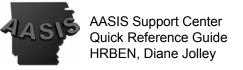
Enrollment or Benefits Change Transaction:	PA30-Maintain Master Data Insurance Plans (0168)	PA30-Maintain Master Data Insurance Plans (0168) Administration Tab / Participation Date	HRBEN0004 – Evidence of Insurability	HRBEN0014 - Benefits Termination
Record Evidence of Insurability	Effective date will be either the date of original application, or the first day of the pay period in which the approved coverage should be deducted. NOTE: For New Hires, the Hire date is the earliest possible date that may be entered.	Effective date of coverage supplied by Insurance Provider. NOTE: Participation may not need to be changed, especially for New Hires.	Effective date will be the first day of the pay period in which the approved coverage should be deducted.  NOTE: For New Hires, the Hire date is the earliest possible date that may be entered.	Not applicable
Employee Termination of benefits due to employment termination	Not applicable	Not applicable	Not applicable	Last day worked (system calculates using payroll rules based on last day worked). Refer to the BPP for Terminate Benefit Coverage.





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Enrollment or Benefits Change Transaction:	PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable	PA30- Maintain Master Data Adjustment Reason (0378)	HRBEN0001 -Enrollment	HRBEN0014 - Benefits Termination
Employee Termination of benefits due to employee signed a cancellation form	Not applicable	Not applicable	Not applicable	Enter date the employee signed the cancellation form. Refer to the BPP for Terminate Benefit Coverage
Termination of benefits due to non-payment	Not applicable	Not applicable	Not applicable	Enter the employee's last day of coverage. Refer to the BPP for Terminate Benefit Coverage.
Rehire - No break in coverage	Refer to EBD	Refer to EBD	Refer to EBD	Not applicable
Rehire - Break in coverage	Date of Re-hire	Date of Re- hire	Date of Re- hire	Not applicable
Transfer- Retirement Plans only (Change)	Not applicable	Date of Transfer	Date of Transfer	HANDLED BY EBD

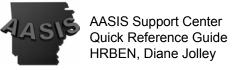




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Enrollment or Benefits Change Transaction:	PA30-Maintain Master Data Family/ Related Person (0021) and Benefits Medical Information (0376) if applicable	PA30-Maintain Master Data Adjustment Reason (0378)	HRBEN0001- Enrollment	HRBEN0014- Benefits Termination
Transfer – All Benefits (Change)	Not applicable	Date of Transfer	Date of Transfer	HANDLED BY EBD
DROP	Not applicable	Not applicable	Not applicable	Last day the employee is eligible for Retirement benefits.

Remember: The effective date MUST be within the current fiscal year. If it is necessary for the agency to have Master Data corrected beyond the current fiscal year, the agency must send a request with justification to Micki Poteet at the Office of Personnel Management/State Payroll (fax number 501-682-5094) for approval.

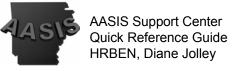




### **QRC 5 – Benefits Administration - Changes**

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Change to be Processed	Role Performing Process	PA30 Adjustment Reason needed.	BPPs Used
Creation of Dependent without deduction change (adding second child)	Agency Benefits Specialist	None	PA30 Create Dependent Record PA30 Add Additional Child to Benefit Plan
Change in Savings plan contributions 457, 403B Vol.	Agency Benefits Specialist	None	HRBEN0001 Anytime Change
Cancel Post-Tax Optional Life Amount	Agency Benefits Specialist	Misc. Benefit Chg.	PA30/HRBEN0001 Change Miscellaneous Benefit Plans
Cancel Post-Tax Dependent Life Amount	Agency Benefits Specialist	Misc. Benefit Chg.	PA30/HRBEN0001 Change Miscellaneous Benefit Plans
Cancel Post-Tax Benefit Plan	Agency Benefits Specialist	Misc. Benefit Chg.	PA30/HRBEN0001 Change Miscellaneous Benefit Plans
Enroll or Change Pre-Tax Plan	State Benefits Specialist	Family Status Change	Processed by EBD
Termination due to Employment Termination	Agency Benefits Specialist	None	HRBEN0014 Terminate Benefits Coverage
Divorce-Post Tax Plans	Agency Benefits Specialist	Misc. Benefit Chg.	PA30/HRBEN0001 Stop Participation for Divorced Spouse
Child becoming ineligible-Pre-Tax Plans	State Benefits Specialist	Family Status Change	FSC handled by EBD
Child becoming ineligible-Post-Tax Plans	Agency Benefits Specialist	Misc. Benefit Chg.	PA30/HRBEN0001 Stop Participation for Ineligible Child
Child becoming ineligible-No deduction affected.	Agency Benefits Specialist	None	HRBEN0001/PA30 Stop Participation for One of Several Children



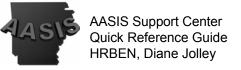


# QRC 6 — Benefits Administration - Reports (Page 1 of 3)

#### **IMPORTANT:**

Remember to limit these reports to your own agency. Instructions are included in the Dependencies of most BPPs. They are as follows: Click on the "Further selections" tab on the first screen. A pop-up window will appear. You may then click on the box in front of the "Personnel area" and click the forward arrow to move this choice to the "Selection fields". Green check at the bottom of this window. This will add a new field, "Personnel area" to your screen. Enter the first two digits of your agency's personnel area followed by two asterisks (\*\*) For Example: for DFA you would use FA\*\* to find all values for this department.

Report name	Menu path	Transaction code	Report results	When to perform report
Eligible employees	Human resources > personnel management > benefits > info system > reports >participation >eligible employees	HRBEN0071	Lists all employees eligible for a particular benefit plan	As needed
Participation report	Human resources > personnel mgmt>benefits > info system > reports > participation > participation	HRBEN0072	Listing of all employees enrolled in benefit plans	As needed

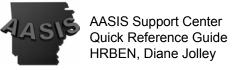




### **QRC 6 – Benefits Administration - Reports**

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Report name	Menu path	Transaction code	Report results	When to perform report
Health plan costs report	Human resources > personnel mgmt > benefits > info system > reports > costs & contributions > health plan costs	HRBEN0073	Listing by employee, by health plan of employee cost, employer cost and provider cost	As needed may be used to calculate an agency's total health plan costs
Monitor eligibility	Human resources > personnel management > benefits > eligibility	HRBEN0003	Listing by employees who are no longer eligible for a plan(s) in which they are enrolled in. Also employees who are enrolled in plans with co- requisite plans in which they are not enrolled	Monthly
Changes in eligibility	Human resources > personnel mgmt > benefits > info system > reports > participation > changes in eligibility	HRBEN0079	Listing of employees who are no longer eligible for a plan(s) in which they are participating.	Recommended monthly





## QRC 6 – Benefits Administration - Reports

(Page 3 of 3)

Report Name	Menu Path	Transaction Code	Report Results	When to Perform Report
Insurance plan costs	Human resources > personnel mgmt > benefits > info system > reports > costs & contributions > insurance plan costs	HRBEN0074	Listing by employee, by <b>insurance</b> plan of employee cost, employer cost and provider cost	As needed May be used to calculate an agency's total insurance plan costs.
Time evaluation Message display Report	Human resources>time Management>administ ration>time evaluation>time evaluation messages	S_PH9_46000588	Message error #ZF displays list of employees whose total work hours are less than scheduled planned hours each pay period.	Quarterly
Deductions not taken report	Sap menu	ZPYUSR0003	Listing of employees who are actively on the payroll but did not have benefit deductions taken during a specific pay period.	Bi-weekly - the day after payrolls have been run.
Headcount changes report	Human resources> personnel management > administration > info system >reports >employee >organizational entity >headcount changes	S_L9B_07000180	Listing of employees who have had a personnel action processed on them, such as drop, etc.	As needed